COLYAR CONSULTING GROUP, INC.

Child Nutrition Program

Summer Food Service Program

User Manual

For Sponsor Users

TABLE OF CONTENTS

TABLE OF FIGURES

1

Introduction

Welcome to the California Department of Education (CDE) Child Nutrition Information and Payment System (CNIPS) user manual for the system's Summer Food Service Program (SFSP) module. CNIPS is a software solution for Nutrition Program management. This system utilizes the Internet to provide administrators, state users, and sponsors with efficient and immediate access to claims, applications, and all SFSP functions.

Web Site Benefits and Features

The CNIPS system is a user-friendly web application that allows state agency personnel and sponsor users to submit and approve documents and claims via the Internet. Key system features include:

- A single software system, which manages information regarding sponsors, applications, claims, and reports.

- A single database, which works behind the scenes to combine configuration information that can be utilized across the child nutrition programs.

- The ability to save partially completed documentation on-line, allowing the user to complete the process at a later time.

- Individual User IDs and passwords for secure login to program functions and accurate tracking of user behavior.

- Security Groupings, which streamline security setting controls by enabling administrators to easily assign users to numerous pre-defined groups and eliminating the need to manually set each user's security access.

User Manual

This user manual is intended for use by the CDE SFSP Sponsor users. It is designed to provide a general understanding of how to use the web site to perform SFSP Module functions effectively and efficiently. To achieve this objective this manual will provide you with:

- A general explanation of each feature available

- Screen examples of web site pages and forms

- Step-by-step instructions for utilizing the web site features

- Tips and Notes to enhance your understanding of the system

Getting Started

Before you can begin using CNIPS, you must be assigned a user ID and password by a CDE administrator and must be granted access to the SFSP Module. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the CNIPS web site. (System Setup is not covered in this manual.)

Accessing the Web Site

You can access CNIPS from any computer connected to the Internet by opening your Internet browser and entering the URL (shown below) in the address line:

<div align="center">https://www.cnips.ca.gov</div>

TIP: You can add this URL to your browser's FAVORITES list or create a shortcut to the web site on your desktop for quicker access to the site. Refer to your browser or operating system help files for further information.

Figure 1: CNIPS Home Page

Logging On

To Log on

1. Access CNIPS by typing the URL into the address line of your web browser of choice
   -OR-
   Open CNIPS from your Desktop or Internet Favorites.

2. In the Log On box, enter your **User ID**.

3. Enter your **Password**.
   The User ID and Password fields are case-sensitive, so be sure to use upper and lower-case letters if necessary. It must be 6-12 characters with at least one letter, one number and one special symbol

4. Click **Log On**.

> **Note:** If you do not have a User ID and Password, contact your Security Administrator.
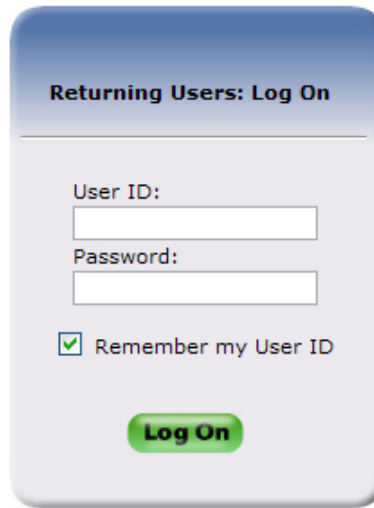
Figure 2: System Log On area

If this is your first time logging on, you may be required to change your password.

To change your password

1. Select a new password and type it into the box provided.

> **Note:** Default settings require a password to be at least six characters in length, containing one or more numbers. However, these settings can be changed by state administrators within the Configuration module.

2. Re-enter your new password for confirmation.

3. Click **Save** to continue to the CNIPS programs page.

> **TIP:** Strong, secure passwords contain between 6 and 15 characters, including numbers, upper-case, and lower-case letters.

CNIPS Content Overview

The CNIPS application contains key elements that provide basic information about your location within the web site or that simplify basic tasks, such as system navigation. (A School Nutrition Program screen displays as an example. Functions are identical for SFSP screens.)
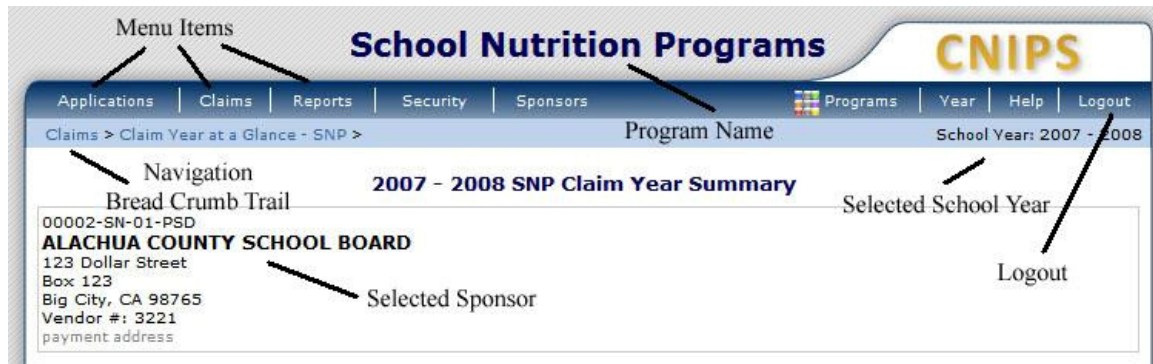
Figure 3: CNIPS Content Overview

Item	Description
Program Name	The selected program name appears in the gray area at the top of the page.
Menu Items	Menu items display on the blue menu bar at the top of the page. Clicking a menu item will take you to its menu page.
Note: Some users do not have access to all menu items. If you are unable to click on a particular menu item, you do not have the necessary security rights. Contact your administrator if you need additional help.	
Navigation / Breadcrumb Trail	The navigation, or breadcrumb trail, shows your location within the web site at all times. Clicking on a specific portion of the trail will bring you back to that particular screen.
Selected Program Year	The selected program year displays on the right beneath the menu bar. Upon logging in, the newest program year will be the default selected school year.
Selected Sponsor	Your selected organization name and information displays as you perform tasks within the system.
Logout	The logout button displays in the menu bar. It is recommended to click logout before exiting the system.

Figure 4: Common Application Components–Screen Options (highlighted)

Some screens in the application offer the user some or all of the following options: **View, Add, Modify**, **Delete**, and **Internal Use Only**. The Screen Options area is located on the right side of the screen directly beneath the colored bar. (A School Nutrition Program screen displays as an example. Functions are identical for SFSP screens.)

The following table describes each of the possible screen options:

Item	Description
View	Presents the screen information in 'view-only' mode. In this mode, the user cannot modify any data.
Modify	Presents the screen in 'modify' mode. In this mode, the user can modify field data and save the data after pressing the save button at the bottom of the screen.
Add	Presents the screen in 'add' mode. In this mode, fields on the screen are empty and field data is enterable by the user. After clicking the save button, a new record is added with the information that was entered. (The screen example does not show this option.)
Delete	Deletes the current record displayed on the screen. The user will typically be presented with a confirmation screen to validate that they intend to delete the record.
Internal Use Only	(State users only) This is available for screens that have an Internal Use Only section which is typically at the bottom portion of the forms on the Application Menu. Clicking on this screen option will result in the internal use fields being editable. This option is only available to state users and as with all screen options, only those options for which users have security access will be available to that user.

CNIPS Programs Page

Once you successfully log on, the CNIPS Programs page provides access to all of the Programs and Modules that comprise the CNIPS system.

Actual access to specific programs and modules depends on a user's security rights. Program tiles only display if the logged-in user has been granted access to the program. For example, sponsor users will not have access to the Accounting, Configuration, and Security tiles, because these programs are only for State users.

Figure 5: CNIPS Programs Page

Click this button	To
SNP	Display the School Nutrition Programs home page
Accounting	Display the Accounting Module home page
Child and Adult Care Program	Display the Child and Adult Care Food Program home page
Configuration	Display the Configuration Module home page
Summer Food Service Program	Display the Summer Food Service Program home page
Security	Display the Security Module home page
Food Distribution Program	Display the Food Distribution Program home page

Summer Food Service Program Home Page

After logging on to CNIPS using your assigned user name and chosen password and clicking the SFSP button, you will be taken to the Summer Food Service Program Module Home Page. All SFSP menu functions are accessible from this screen within the blue menu bar.

To access the Summer Food Service Program home page

1. Log on to the CNIPS web site.

2. On the Programs screen, click **Summer Food Service Program**.

3. The SFSP Module Home Page displays.
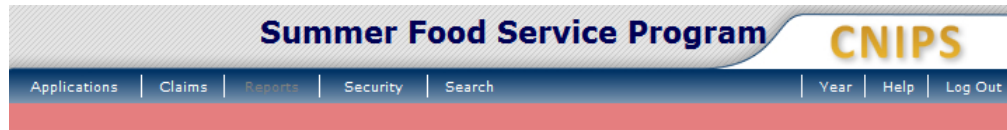
Welcome to the Child Nutrition Information and Payment System

Figure 6: Summer Food Service Program Home Page

From the SFSP home page, you can select a menu item from the blue menu bar at the top of the page. The Summer Food Service Program menu bar contains only menu items specific to the Summer Food Service Program. The table below describes the features available for each menu option, which the remainder of this manual will discuss in detail:

Menu Item	Menu Features
Applications	▪ **Sponsor Profile –** Displays Sponsor's Profile Information ▪ **Application Packet -** Displays Applications and Agreement Forms (Sponsor and Site) ▪ **Advance Requests –** Displays SFSP Advances for the current year ▪ **Download Forms -** Displays Forms for Downloading - SFSP ▪ **Annual Audit Status Certification Form -** Displays Form Annual Audit Status Certification Form that non-exempt sponsors complete
Claims	▪ **Claim Entry –** Access to Claim Entry ▪ **Payment Summary -** Displays Payment Summary

Reports	▪ **Report List**—Contains all reports available in the SFSP Module.
Security	▪ **Change Password –** Access to Change Password for Logged-In User ▪ **User Manager -** Displays User Manager for selected sponsor
Search	▪ Opens the SFSP Search Options menu

Error Processing

All information entered and saved on the site is checked to ensure it conforms to data entry guidelines and system rules. The site performs two types of checks on information entered: Input Edits and Business Rule Edits.

Input Edits

Whenever you save information or proceed to a new screen, the site checks for Input Errors. These errors are generally typographical mistakes, such as entering a 4-digit Zip Code or entering characters in a numeric field. If a form contains an input error, the screen re-displays with the error code and description in red at the top of the page. The error code also displays in front of the field containing the error, making it easy to scroll down the page and quickly identify the error. These errors must be corrected before you can proceed.

Figure 7: Input Error (Partial Screen)

Business Rule Edits

Business rule edits are used to ensure that all required data on a form does not conflict with site guidelines or information entered on the site. For example, if you enter a Reduced Meal Price greater than the Full Price Meal price, you will receive a business rule error.

The site runs business rule edits when a form is saved on the site. Business rule errors display on a save confirmation screen. The errors will also display with a code description and severity at the

bottom of the form containing the errors. The description briefly describes and indicates which field contains the error. In addition, the error severity indicates whether an error is considered a Warning or an Error. Errors appear in red and must be corrected before the agreement or form can be approved. Warnings appear in blue and indicate something out of the ordinary, but not crucial to the approval of the agreement or form, has been detected.

Code	Warning Description
1502B	Contact CDE regarding purchasing meals /snacks from a vendor other than an SFA.

Figure 8: Warning Code and Description

Other Errors

CD Code Error

While completing Sponsor Profile information, if you save a CD code on the Sponsor Profile screen, you will receive a confirmation screen that displays the code with the Sponsor Name and address if the code is "found" in the CD look-up table. If the information is correct, click **Confirm** to save the CD information for the Sponsor. If a correct CD Code is entered, the Sponsor Name and Street Address will display (view-only) on the Sponsor Application.

WARNING: If an incorrect CD Code was entered, but the code was "found" on the CD look-up table, CNIPS will not recognize that the code does not belong to the Sponsor. It is the user's responsibility to confirm that the CD Code, Sponsor Name, and Street Address are correct for the sponsor.

If you enter a CD code that is **"not found"** in the CD look-up table, you will receive the following message: "No match found for this CD Code. Please click Edit to either change the CD Code or remove the CD Code and enter the Sponsor's Name." If you receive this message, follow the instructions below:

1. Click **Edit** beneath the red message to change the CD code or remove the CD code and enter the Sponsor's Name.

   Note: If you remove the CD code and only enter the Sponsor's Name, you are able to save the Sponsor Profile information, but no CD Code will display.

2. After changing or removing the CD code, click **Save**.

3. If a new CD code was correctly entered, you must confirm the code by clicking **Confirm**. If a new CD code was incorrectly entered, click **Edit** to return to the previous page. A confirmation message displays.

4. Click **<Edit** to return to the screen you just modified.
   -OR-
   Click **Finish** to return to the Sponsor Profile Menu.

CDS Code Error

While completing and saving Site Profile information, you will receive an error message if you enter a County District (CDS) Code in the CDS Code field that is "not found" in the CDS look up tables in CNIPS.

Without a correct CDS code, the site profile information cannot be saved. Furthermore, a CDS Code is **required** for public school districts in order for state users to recommend approval of the site application. If you receive a message specifying that a CDS code was not found, follow the instructions below:

1. Click **Edit** beneath the red message to change the CDS code or remove the CDS code and enter the Site's Name.

    Note: If you remove the CDS code and only enter the Site's Name, you are able to save the Site Profile information, but no CDS Code will display.

2. After changing or removing the CDS code, click **Save.**

3. If a new CDS code was correctly entered, you must confirm the code by clicking **Confirm.**
    If a new CDS code was incorrectly entered, click **Edit** to return to the previous page.
    A confirmation message displays.

4. Click **<Edit** to return to the screen you just modified.
    -OR-
    Click **Finish** to return to the Sponsor Profile Menu.

Selecting a Program Year

Information for sponsors and sites displays only for the selected school year. Upon logging on to the system, the current program year is the default selection and displays in the top-right corner in the light blue bar. In order to view information from a different year, you will need to change the school year.

Note: Some sponsors may be unable to select a new year if they have not been granted the security right. Contact your administrator and request that you be given the **Select Year** security right if you feel this is in error.

To select a program year

1. Click **Year** on the blue menu bar at the top of the page.
    The Year Select screen displays.

2. Click the program year you wish to select.

    Note: The selected program year is indicated by the **<Selected** to the right of the year.

3. Use the menu bar to return to your task in the program.

3

Applications

Now that you know how to access and log on to CNIPS, the remainder of the manual will explore the functions of the Summer Food Service Program Module. Let's first look at the Applications component of CNIPS, where users manage yearly enrollment of sponsors and sites and complete the appropriate forms required by the CDE.

About the Program Year Enrollment Process

In order to participate in the SFSP, sponsors and sites must submit an Application Packet to the State for review and approval. Before beginning the Application Packet, sponsors must click the "Enroll" button on the Application Packet screen. After a sponsor is enrolled, they must complete all required application and forms in the Application Packet for the school year.

A new Application Packet must be submitted and approved at the beginning of each Program Year. Some sponsors may have certain information from the previous program year "rollover" into the next program year as a part of their annual update, so the Sponsor does not have to complete every field every year. Once the Application Packet is approved, monthly claims for reimbursement may be submitted, approved, and scheduled for payment by the CDE Accounting Office.

The Sponsor can submit the Application Packet to the State once all necessary applications have been completed and saved without errors. In addition, all supporting documents must be received and reviewed by the State in order to approve a Sponsor's Application Packet

> **TIP:** The Checklist feature automatically lists the required supporting documents based upon the sponsor's answers to certain application questions. The State can manage the documents' receipt and status from within this feature. For more information, see **Checklist**.

Once the Application Packet has been submitted to the State for approval, the Date Submitted automatically displays and the packet status changes to **Submitted for Approval** at the bottom of the Applications menu. The State changes the packet status as the application is reviewed and contacts the sponsor organization regarding any problems in the packet.
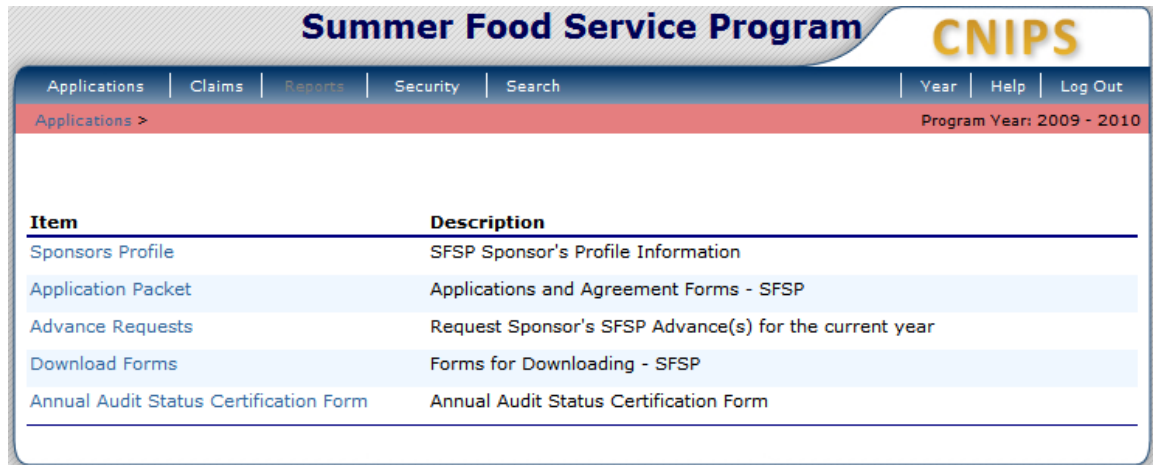
Application Packet Review

Once a sponsor's Application Packet has been submitted, it must be reviewed by a state user. For new sponsors, all application materials and supporting documents in the Application Packet must be reviewed and approved by CDE (Sponsor Application, Site Applications, Checklist, etc.) Once the Application Packet is reviewed, the **Approve** button appears on the sponsor's packet and the sponsor can begin submitting claims for reimbursement. The site updates the approval status line on the Applications menu with the date the package was approved and changes the packet status to Approved.

Note: If the sponsor organization submits a Revised Application, which occurs when a sponsor makes any changes to an Application Packet that has already been approved, the original packet's status automatically changes to **"Not Submitted."** A state user must then re-review the Revised Application Packet in order to recommend for approval.

Applications Menu

The Applications menu is the starting point for all tasks related to the annual SFSP Enrollment process. The figure below displays the Application menu items and descriptions:

Figure 9: Applications Menu screen

To access the Applications Menu

1. On the blue menu bar, click **Applications.**
    The Applications Menu displays.

2. Click an application item to access that application function.

3. -OR-
    Click **Finish** to return to the Sponsor Profile Menu screen.

Application Packet

In order to participate in the Summer Food Service Program (SFSP), sponsors must submit an application packet to the State for review and approval. At the beginning of each program year, sponsor data is rolled over and must be verified by sponsors prior to submitting any claims.

The Application Packet contains the sponsor application, site application(s), and other forms required as a part of the packet. After selecting Application Packet from the Applications menu, each required packet item and its status displays. If any packet item requires attention—such as an error within a form or a checklist item to be completed—a red notification displays on the right. For more details, see Reviewing an Application.

> **TIP:** The State cannot approve your application until all supporting documents have been received and reviewed. The Checklist feature automatically lists the required supporting documents based upon the sponsor's answers to certain application questions. For more information, see Checklist.

Note: Applications may be modified at any point before it has been approved. However, should corrections be necessary after the application has been approved, a revised application must be submitted. The packet's status automatically changes to **Unapproved** and the packet must be resubmitted for approval.

To access the Application Packet

1. On the blue menu bar, click **Applications.**
   The Applications menu screen displays.

2. On the menu, click **Application Packet**.
   The Application Packet screen displays.

3. If no program year has been selected, click the year you wish to access.
   The Application Packet screen displays.

4. Click the Packet Item you want to access.

Note: The Packet Items shown in the figure below represent all possible items. Depending on the answers you provide in the Sponsor Application, your Application Packet screen will display some or all of these items.

2009 - 2010 Application Packet

02998-SFSP-17
Colyar Test SFSP
123 Street Address
Test State, CA 11111
LAKE
CD:
Vendor #: Z41234

Packet Item	Status	
Sponsor Application	Approved	
Site Application(s) - Summer Food Service Program	1 Applications	0 Require(s) Attention
Food Production Facility Information	1 Facility	
Site Field Trip(s)	2 Field Trip	0 Require(s) Attention
Annual Budget	Approved	
Management Plan	Approved	
Checklist	8 Item(s)	0 Require(s) Attention

[< Back] [Submit for Approval]

Packet History

Event	Event Date/Time	User
The application packet was approved.	6/17/2009 9:00:39 AM	Developer
The application packet was given the first level approval.	6/17/2009 9:00:37 AM	Developer
The application packet was submitted.	6/17/2009 8:57:26 AM	Developer
The sponsor re-opened enrollment for the year.	6/16/2009 10:25:20 AM	Developer
The sponsor's enrollment was closed/terminated by: 'Self Cancelled' for the year as of: 01/01/2010.	6/16/2009 10:25:11 AM	Developer
Colyar Test SFSP was enrolled in 2010.	6/5/2009 9:37:33 AM	Developer

Figure 10: Application Packet screen

To withdraw an application packet

Note: Withdrawing an application packet will remove all contents of the application packet from the system. A packet can only be withdrawn if the sponsor application has not yet been approved.

1. From the Applications menu, click **Application Packet**.

2. If no program year has been selected, click the year you wish to access.
   The Application Packet screen displays.

3. Click **Withdraw Packet**.
   A message box displays.

4. Click **OK** to withdraw the packet.

Sponsor Application

The Sponsor Application screen provides access to the sponsor's annual application for the Summer Food Service Program for both new and renewing sponsors. The sponsor is required to complete a new sponsor application annually (sponsor data may be rolled over from the previous year and, then, verified by the sponsor).

To access a sponsor application

1. On the menu bar, click **Applications.**
   The Applications menu screen displays.

2. On the menu, click **Application Packet**.
   The Application Packet screen displays.

3. Under Packet Item, click **Sponsor Application**.
   The [Year] SFSP Sponsor Application Effective Dates screen displays.

Note: The SFSP Sponsor Application Effective Dates screen displays all versions of the Sponsor Application, the status of each application, and the Approved Date, once approved by the State. The 'Revise Application' button becomes available once the Sponsor Application has been approved by the State.

2009 - 2010 SFSP Sponsor Application Effective Claim Dates

02998-SFSP-17
Colyar Test SFSP
123 Street Address
Test State, CA 11111
LAKE
CD:
Vendor #: Z41234

Effective Date	Version	Status	Approved Date
Oct 2009	1	Error	

[< Back]   [End Agreement]

Figure 11: Sponsor Application Effective Dates

To add an application

1. From the Applications menu, click **Application Packet**.

2. If no program year has been selected, click the year you wish to access.
   The Application Packet screen displays.

3. Under Packet Item, click **Sponsor Application**.
   The [Year] SFSP Sponsor Application Effective Dates screen displays.

4. Click **Add Application.**
   The [Year] Sponsor Application displays.

   Note: This screen displays in **MODIFY** form by default.

5. Complete all sections of the application completely and correctly.

6. Click **Save** once all data has been entered.
   A confirmation screen displays.

7. Click **<Edit** to return to the previous page
   -OR-
   Click **Finish** to return to the [Year] Sponsor Application Effective Dates screen.

To view or modify an application

Note: The application may only be modified if the application has not been approved by the State. Once the application has been approved, you must **revise** the application to make additional changes (see **To revise an application**).

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Sponsor Application**.
   The [Year] SFSP Sponsor Application Effective Dates screen displays.

3. Under Effective Date, click date of the version you wish to view.
   The [Year] SFSP Sponsor Application screen displays. If the status of the Version of the Sponsor Application you select is approved, the screen will display in View mode only.

To revise an application

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Sponsor Application**.
   The [Year] SFSP Sponsor Application Effective Dates screen displays.

3. Click **Revise Application**.
   The [Year] SFSP Sponsor Application screen displays.

4. Modify any desired information.

5. Click **Save**.
   A confirmation screen displays.

6. Click **<Edit** to return to the Sponsor Application screen you just modified.
   -OR-
   Click **Finish** to return to the SFSP Sponsor Application Effective Dates screen.

To delete a sponsor application

Note: A sponsor application can only be deleted if the sponsor has not yet submitted any claims for the school year.

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Sponsor Application.**

3. Click the application you wish to delete.

4. Click **Delete** on the Edit menu in the top-right corner.

WARNING: Once the application has been deleted, it is permanently removed and cannot be restored. Use caution before deleting an application.

5. Click **Delete** at the bottom of the page.
   A confirmation displays.

Site Application(s) – Summer Food Service Programs

Sponsors must complete a Site Application for each of their sites. The Site Application screen provides access to the site's annual application for SFSP for both new and renewing sites. Sites must complete a new application annually (site data may be rolled over from the previous year and, then, verified by the sponsor).

To access a site application

1. On the blue menu bar, click **Applications.**

2. On the menu, click **Application Packet**.
   The Application Packet screen displays.

3. Under Packet Item, click **Site Application(s) – Summer Food Service Program**.
   The [Year] Application Packet - SFSP Enrolled Sites screen displays.

2009 - 2010 Application Packet - SFSP Site List

02998-SFSP-17
Colyar Test SFSP
123 Street Address
Test State, CA 11111
LAKE
CD:
Vendor #: Z41234

Site	Status	Last Updated
14065 - Colyar Test SFSP 2	Not Submitted	06/12/2009
Add Site		

Total Sites Listed: 1

< Back

Figure 12: Application Packet – SFSP Enrolled Sites screen

To add a new site

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Site Application(s) - Summer Food Service Program.**
   The [Year] Application Packet - SFSP Enrolled Sites screen displays.

3. Click **Add Site.**
   The [Year] SFSP Available Sites screen displays.

   Note: The sites displayed on this screen are sites that exist for a sponsor, but who have not completed a site application.

4. Click **Add Site.**
   The 'Quick' Site Profile screen displays.

5. Enter the CDS Code, if necessary.

6. Enter the Site Name.

7. Click **Save.**
   The [Year] SFSP Site Application Effective Dates screen displays.

8. Click **<Back** to return to the [Year] Application Packet - SFSP Enrolled Sites screen.

To add a site application

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Site Application(s) - Summer Food Service Program.**
   The [Year] Application Packet - SFSP Enrolled Sites screen displays.

3. Click **Add Site.**
   The [Year] SFSP Available Sites screen displays.

4. Click the site name for which to wish to add an application.

5. Click **Add Application.**

6. Enter all relevant information.

7. Click **Save.**

8. Click **<Edit** to return to the previous screen
   -OR-
   Click **Finish** to return to the [Year] SFSP Site Application Effective Dates screen.

To view or modify a site application

Note: Site applications can only be modified prior to approval by the State. Once approved, the application must be 'revised'. Site applications may be viewed at any time.

1. From the Applications menu, click **Application Packet**.

2. If no program year has been selected, click the year you wish to access.
   The Application Packet screen displays.

3. Under Packet Item, click **Site Application(s) - Summer Food Service Program.**
   The [Year] Application Packet - SFSP Enrolled Sites screen displays.

4. Select the site you wish to view or modify.

5. Under Effective Date, click the date of the site application you wish to view or modify.
   The [Year] SFSP Site Application screen displays.

   Note: This screen displays in **MODIFY** form by default. To view only, click **VIEW** in the Edit menu (top-right corner).

6. Make any desired modifications.

7. Click **Save** once all changes have been entered.

To delete a site application

Note: A site application can only be deleted if the site has not yet been approved.

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Site Application(s) - Summer Food Service Program.**
   The [Year] Application Packet - SFSP Enrolled Sites screen displays.

3. Select the site you wish to delete.

4. Click the Effective Date of the site application you wish to delete.

5. Click **Delete** on the Edit menu in the top-right corner.

WARNING: Once the application has been deleted, it is permanently removed and cannot be restored. Use caution before deleting an application.

6. Click **Delete** at the bottom of the page.
   A confirmation displays.

To revise a site application

Note: You can only revise an approved application. An application may be modified if it has not already been submitted.

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Site Application(s) - Summer Food Service Program.**
   The [Year] Application Packet - SFSP Enrolled Sites screen displays.

3. Select the site you wish to view

4. Click **Revise Application**.
   The [Year] SFSP Site Application screen displays.

5. Modify any desired information.

   Note: To make any modifications, **MODIFY** must be selected on the Edit menu.

6. Click **Save**.
   A confirmation screen displays.

7. Click **<Edit** to return to the Site Application screen you just modified.
   -OR-
   Click **Finish** to return to the SFSP Site Application Effective Dates screen.

Food Production Facility Information

The Food Production Facility Information section of the Application Packet contains information about a sponsor's added facilities. Sponsors must complete this form as a part of the packet to detail food production facility and vending services.

To access Food Production Facility Information

1. On the blue menu bar, click **Applications.**
   The Applications menu screen displays.

2. On the menu, click **Application Packet**.
   The Application Packet screen displays.

3. Under Packet Item, click **Food Production Facility Information**.
   The Food Production Facility Information screen displays.

Figure 13: Food Production Facilities screen

To add a food production facility

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Food Production Facility Information**.
   The Food Production Facility Information screen displays.

3. Click **Add Facility.**

4. Enter all Food Production Facility information.

5. Click **Save.**
   A confirmation screen displays.

6. Click **<Edit** to return to the Food Production Facility Information screen you just modified.
   -OR-
   Click **Finish** to return to the Application Packet screen.

To modify Food Production Facility Information

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Food Production Facility Information**.
   The Food Production Facility Information screen displays.

3. Click the facility name.

4. Modify any desired information.

   > **Note**: To make any modifications, **MODIFY** must be selected on the Edit menu.

5. Click **Save**.
   A confirmation screen displays.

6. Click **<Edit** to return to the Food Production Facility Information screen you just modified.
   -OR-
   Click **Finish** to return to the Application Packet screen.

Food Production Facility

02998-SFSP-02
Colyar Test SFSP
1 Main St
Big City, CA 95159
ALPINE
CD:
Vendor #: Z41234

Food Production Facility Information

1. Select the food preparation type:

2. Facility Name:

    Address 1:

    Address 2:

    City:

    State: CA   Zip:

    Facility Contact
    Name:

3. If vended by SFA, camp facility food service, or
    another SFSP sponsor, enter the vendor name:

4. If vended by a commercial food service vendor,
    enter CFSV name as shown on the registered
    vendor list. If name is not listed, leave this blank.

5. If meals will be vended, indicate whether the sponsor is   ○ I will be using the CDE, Nutrition Division's
    using its own contract forms or using CDE   (NSD) agreement or contract and
    contract/agreement forms.   Invitation For Bid (IFB)

                                                                ○ I will be using the Sponsor's contract
                                                                   forms

6. Is the sponsor extending the CFSV contract for which it went   ○ Yes   ○ No   ○ N/A
    out for bid?

7. Start date of contract with CFSV:

8. End date of contract with CFSV:

9. Number of renewal years specified in the contract:

10. Current extension number:

Save Cancel

Figure 14: Food Production Facilities screen

To delete a facility

1. From the Applications menu, click **Application Packet**.
    The Application Packet screen displays.

2. Under Packet Item, click **Food Production Facility Information**.
    The Food Production Facility Information screen displays.

3. Click the facility you wish to delete.

4. On the Edit toolbar, click **DELETE**.

5. Click the **Delete** button.

> **WARNING:** Clicking the button permanently deletes the Food Service
> Management Company Fact Sheet from the application and it will not be
> recoverable once deleted.

6. Click **Finish** to return to the Application Packet screen.

Site Field Trip(s)

Users can create new, view, modify, or delete field trips within Site Field Trip(s) section of the
Application Packet.

To access Site Field Trips

1. On the blue menu bar, click **Applications.**
   The Applications menu screen displays.

2. On the menu, click **Application Packet**.
   The Application Packet screen displays.

3. Under Packet Item, click **Site Field Trips**.
   The Site Field Trips screen displays.

To create a new field trip

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Site Field Trips.**

3. Click **Create New Field Trip.**

4. Select the desired site from the dropdown list

5. Click **Continue**.

Field Trip Details

02998-SFSP-17
Colyar Test SFSP
123 Street Address
Test State, CA 11111
LAKE
CD:
Vendor #: Z41234

No address on file for this year
CDS Code:

New Field Trip - Select a Site

Field Trip Site: Colyar Test SFSP 2

< Back   Continue

Figure 15: Field Trip Details – New Field Trip – Select a Site

6. Enter Trip Details.

   Note: To input details, **MODIFY** must be selected on the Edit menu.

7. Click **Save**.
   A confirmation screen displays.

8. Click **<Edit** to return to the Site Field Trips screen you just modified.
   -OR-
   Click **Finish** to return to the Application Packet screen.

Field Trip Details

02998-SFSP-17	14065
Colyar Test SFSP	**COLYAR TEST SFSP 2**
123 Street Address	addr
Test State, CA 11111	cty, CA 11111
LAKE	ALBANY
CD:	CDS Code:
Vendor #: Z41234	

Trip Details:

1. Trip Date: _____

2. Status of Site: [Site will remain open ▼]

3. Affected Meal Type(s):
    - ☐ Breakfast
    - ☐ AM Snack
    - ☐ Lunch
    - ☐ PM Snack
    - ☐ Supper
    - ☐ CCNSP

4. Number of Children Attending Field Trip: _____

5. Name of Field Trip destination: _____

6. Cancel Request: ☐

Internal Use Only:

7. CDE Approval: ○ Approved   ○ Denied

[Save] [Cancel]

Figure 16: Field Trip Details – Trip Details

To modify or cancel field trip request

Note: A field trip request may be cancelled after the field trip has been approved by the State. If a field trip request has not been reviewed, the user can delete the field trip.

1. From the Applications menu, click **Application Packet**.
    The Application Packet screen displays.

2. Under Packet Item, click **Site Field Trips.**

3. Click the Field Trip Name or Date link.

4. Modify any desired information.
    -OR-
    Check **Cancel Request** to cancel.

5. Click **Save**.
    A confirmation screen displays.

6. Click **<Edit** to return to the Site Field Trips screen you just modified.
    -OR-
    Click **Finish** to return to the Application Packet screen.

To delete a field trip

Note: A field trip CANNOT be deleted once it is approved. To cancel a field trip, you must the cancel the field trip request. See **To modify or cancel a field trip request.**

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Site Field Trip(s)**.
   The Site Field Trip(s) screen displays.

3. Select the field trip you wish to delete.

4. On the Edit toolbar, click **DELETE**.

5. Click the **Delete** button.

> **WARNING:** Clicking the button permanently deletes the Site Field Trip from the application and it will not be recoverable once deleted.

6. Click **Finish** to return to the Application Packet screen.

Annual Budget

Each year, sponsors must submit an annual budget to the State for review. The Annual Budget is accessible within the Application Packet, wherein sponsor users can create a new budget, modify an un-reviewed budget, or revise a reviewed budget. (Budgets that are approved can only be opened in read-only mode. If a revision is required for an approved budget, a new revised budget must be created by clicking on the "Revise Budget" button.) Here, State users also review the sponsor's budget.

To access the annual budget

1. On the blue menu bar, click **Applications.**
   The Applications menu screen displays.

2. On the menu, click **Application Packet**.
   The Application Packet screen displays.

3. Under Packet Item, click **Annual Budget**.
   The SFSP Budget List screen displays.

To create an annual budget

1. From the Applications menu, click **Application Packet.**
   The Application Packet screen displays.

2. Under Packet Item, click **Annual Budget**.
   The SFSP Budget List displays.

3. Click **Create New Budget.**
   The SFSP Budget Detail displays.

4. Enter all information.

5. Click **Save**.

6. Click **<Edit** to return to the previous screen.
   -OR-
   Click **Finish** to return to the Application Packet screen.

To revise or modify the annual budget

Note: A budget may be **modified** only until it has been reviewed by the State. Once the budget has been reviewed, the user must **revise** it in order to make changes. The State must re-review all revisions to the budget.

1. From the Applications menu, click **Application Packet.**
   The Application Packet screen displays.

2. Under Packet Item, click **Annual Budget**.
   The SFSP Budget List displays.

3. Select the budget version to modify.
   -OR-
   Click **Revise Budget.**
   The SFSP Budget Detail displays.

VIEW | **MODIFY** | DELETE | INTERNAL USE ONLY

2007 - 2008 SFSP Budget Detail

02998-SFSP-02
Colyar Test SFSP
1 Main St
Big City, CA 95159
ALPINE
CD:
Vendor #: Z41234

Budget Version: Original

Operating Reimbursement

Meal	Sites	Total Meals	Total
Breakfast	3	18,105	$ 27,338.55
Lunch	2	19,875	$ 52,470.00
Snack	1	19,500	$ 11,895.00
Supper	1	2,180	$ 5,755.20
CCNSP Snack	0	0	$ 0.00
		Sub Total	$97,458.75

Administrative Reimbursement

Meal	Sites	Total Meals	Total
Breakfast	3	18,105	$ 2,546.10
Lunch	2	19,875	$ 5,465.62
Snack	1	19,500	$ 1,462.50
Supper	1	2,180	$ 501.40
CCNSP Snack	0	0	$ 0.00
		Sub Total	$9,975.62

Projected Operating Costs

Food for all vended and self-prep meals:	$	0.00
Non Food Supplies:	$	0.00
Operational Personnel (Prep, Serving, Supervision and Clean-up):	$	0.00
Facility and Utility:	$	0.00
Equipment Rental:	$	0.00
Transportation:	$	0.00
Other:	0	$	0.00
	Sub Total	$0.00

Projected Administrative Costs

Administrative Personnel:	$	0.00
Office Expense, such as printing, postage, phone, etc.:	$	0.00
Facility and Utility:	$	0.00
Transportation:	$	0.00
Other:	0	$	0.00
Indirect Cost:	0.00 %	$	0.00
Name of Cognizant Agency:	test	
	Sub Total	$0.00

Figure 17: SFSP Budget Detail (part I)

Figure 18: SFSP Budget Detail (part II)

4. Modify any desired information.

5. Click **Save.**

6. Click **<Edit** to return to the previous screen.
   -OR-
   Click **Finish** to return to the Application Packet screen.

Management Plan

Sponsors must submit a management plan as a part of their application packet. The Management Plan is accessible within the Application Packet, wherein sponsor users can create a new plan, modify an un-reviewed plan, or revise a reviewed plan. (Budgets that are approved can only be opened in read-only mode. If a revision is required for an approved budget, a new revised budget must be created by clicking on the "Revise Budget" button.) Here, State users also review the sponsor's management plan.

To access the management plan

1. On the blue menu bar, click **Applications.**
   The Applications menu screen displays.

2. On the menu, click **Application Packet**.
   The Application Packet screen displays.

3. Under Packet Item, click **Management Plan**.
   The SFSP Management Plan screen displays.

To add a management plan

1. From the Applications menu, click **Application Packet.**
   The Application Packet screen displays.

2. Under Packet Item, click **Management Plan**.
   The SFSP Management Plan displays.

3. Click **Add Management Plan.**
   The SFSP Management Plan (detail) displays.

4. Enter all information.

5. Click **Save**.

6. Click **<Edit** to return to the previous screen.
   -OR-
   Click **Finish** to return to the Application Packet screen.

To revise or modify a management plan

Note: A management plan may be **modified** only until it has been reviewed by the State. Once the management plan has been reviewed, the user must **revise** it in order to make changes. The State must re-review all revisions.

1. From the Applications menu, click **Application Packet.**
   The Application Packet screen displays.

2. Under Packet Item, click **Management Plan**.
   The SFSP Management Plan displays.

3. Select the budget version to modify.
   -OR-
   Click **Revise Management Plan.**
   The SFSP Management Plan (detail) displays.

4. Modify any desired information.

5. Click **Save.**

6. Click **<Edit** to return to the previous screen.
   -OR-
   Click **Finish** to return to the Application Packet screen.

Checklist

A checklist is automatically generated based upon answers to specific questions from the sponsor and site applications and lists the supplemental documents that need to be submitted to the state outside of the CNIPS system. For example, paper contracts or addendum may need to be submitted via mail. The Checklist feature allows sponsors to keep track of documents and their dates of submission. State users use this feature to check when documents have been received and to denote the status of the documents.

To access a checklist

1. On the blue menu bar, click **Applications.**
   The Applications menu screen displays.

2. On the menu, click **Application Packet**.
   The Application Packet screen displays.

3. Under Packet Item, click **Checklist**.
   The SFSP Checklist Summary screen displays.

To view a checklist

1. From the Applications menu, click **Application Packet**.
   The Application Packet screen displays.

2. Under Packet Item, click **Checklist**.
   The SFSP Checklist summary displays.

3. Select the Sponsor or SFSP Site you wish to view a checklist for.
   The SFSP Checklist screen displays.

   Note: Only sponsors and sites who have completed their application and who have additional required documents will have a checklist.

SFSP Checklist Summary

02998-SFSP-17
Colyar Test SFSP
123 Street Address
Test State, CA 11111
LAKE
CD:
Vendor #: Z41234

Sponsor	Total Items	Submitted Items	Approved Items
Colyar Test SFSP	4	0	0

Summer Food Service Program Sites	Total Items	Submitted Items	Approved Items
Colyar Test SFSP 2	1	0	0

< Back

Figure 19: SFSP Checklist Summary screen

4. Enter all relevant information in the Internal Use Only section.

   Note: The **Effective Date** in the Internal Use Only section will be updated with the current date upon every save. The value can be over-written by state users within the Internal Use Only section of the page.

5. Click **Save Internal Use Only.**
   A confirmation screen displays.

6. Click **<Edit** to return to the SFSP Checklist screen you just modified.
   -OR-
   Click **Finish** to return to the SFSP Checklist Summary screen.

Advance Requests

The Advance Requests function enables sponsors to view, modify, and submit advance requests to the State.

To access Advance Requests

1. On the blue menu bar, click **Applications**.
   The Applications menu screen displays.

2. On the menu, click **Advance Requests**.
   The SFSP Advance Requests screen displays.

Figure 20: Advance Requests screen

To add an advance request

1. Access **Advance Requests** through the Applications menu.

2. Click the **Add** link in the Action column.

3. Complete all information.

Figure 21: Advance Detail - Modify screen

4. Click **Save.**

5. Click **<Edit** to return to the previous screen.
   -OR-
   Click **Finish** to return to the Application Packet screen.

To view or modify an advance request

1. Access **Advance Requests** through the Applications menu.

2. Click the advance request you wish to view.

3. Make any desired changes.

4. Click **Save.**

Figure 22: SFSP Advance Request - Modify

To delete an advance request

1. Access **Advance Requests** through the Applications menu.

2. Click the **View** or **Modify** link for the advance request you wish to review.

3. Click DELETE on the Edit menu.

4. Click the **Delete** button.

5. Click **Finish.**

Download Forms

The Download Forms function allows users to view, download and/or print all forms and documents made available on the site by the State.

To access Download Forms

1. On the blue menu bar, click **Applications**.
   The Applications menu screen displays.

2. On the menu, click **Download Forms**.
   The Download Forms Screen displays.

To download or view a form

1. Access **Download Forms** through the Applications menu.
   All available download forms display.

2. Click the name of the form you wish to view.
   For some forms, a gray dialog box appears.

3. Click **Open** to view the form.
   - OR -
   Click **Save** to save the form to your computer.
   The application assigned to open the file launches and displays the form.

   > **Note:** Some forms may open in a new window without a gray dialog box. To save the form, use the **Save** function in the new browser window.

4. Click **<Back** to return to the Download Forms screen.

Download Forms

Form ID	Description	Last Modified	New Sponsor?
4	test	07/23/2008	
sfsp-02	test	01/28/2009	
SFSP_01	This is a sample form for the Summer Food Service Program.	04/13/2009	
SFSP_Test	SFSP Test Download Document	05/21/2009	

< Back

Figure 23: Download Forms screen

Annual Audit Status Certification

The Annual Audit Status Certification Form screen provides access to the selected sponsor's Annual Audit Status Certification form based on the year that is selected. The State of California requires all SFSP sponsors *except* school districts and charter schools (types K, L, and M) to fill out an annual audit status certification form one time per year.

> **Note:** The Year will default to the current year, if the year needs to be changed, clicking the Year option on the blue menu bar at the top of the page will allow the user to select a different year, provided that they have the necessary security clearance.

The Annual Audit Status Certification Form screen allows the sponsor to enter its information and allows the Department to view the entered data along with audit data imported from Audits and Investigation.

To view an annual audit status certification form

1. On the blue menu bar, click **Applications**.
   The Applications menu screen displays.

2. On the menu, click **Annual Audit Status Certification Form**.
   The Annual Audit Status Certification Form screen displays.

2007 - 2008 Annual Audit Status Certification Form

02998-SFSP-02
Colyar Test SFSP
1 Main St
Big City, CA 95159
ALPINE
CD:
Vendor #: Z41234

Name and Title of Authorized Representative

	Salutation	First Name		Last Name
Name:	Mrs.	Sally		Smith
Email Address:				
Phone:	(555) 555-1234	Ext:	04	Fax: (555) 555-9876
Title:	Director			

Organization Type

Figure 24: Annual Audit Status Certification Form (Partial)

To delete an annual audit status certification form

Note: Annual Audit Status Certification Forms may only be deleted if they are NOT reviewed as "Completed" by the State.

1. From the Application menu, click **Annual Audit Status Certification Form**.
   The Annual Audit Status Certification Form screen displays.

2. On the Edit menu, click **DELETE**.
   A warning displays.

WARNING: Clicking the button permanently deletes the Annual Audit Status Certification Form from the application and it will not be recoverable once deleted.

3. Click **Delete**.
   A confirmation screen displays.

4. Click **Finish** to return to the Applications menu.

4

Claims

The CNIPS Claims component allows sponsors to submit monthly online reimbursement claim requests to the State. The sponsor begins by submitting a monthly reimbursement claim to the California Department of Education. These claims are approved for payment once they have been cleared of all errors, submitted and accepted by CNIPS.

About the Claims Process

Your sponsor organization can submit a reimbursement claim for every month in which one or more sites participates in the Summer Food Service Program. Beginning at the first of every month, you can begin the claim submission process by entering sponsor and site information into the monthly claim form. Organizations have sixty days from the last day of the claim month/year to submit an original claim

Note: Claims cannot be created for month if there is no application in effect for that period (if you cannot access claims, be sure your application packet has been submitted without error and approved by the State).

At the time claims are submitted, they are checked by the site to ensure they conform to established business rules governing reimbursement claim eligibility and approval. Only claims the site deems **Okay to Pay** may be submitted to the State for processing, thereby alleviating the need to manually review claims.

The table below describes the steps necessary for submitting and processing a claim:

Performed by	Task
Sponsor	Complete sponsor reimbursement claim forms for the program month
Sponsor	Complete each site claim for the program month
Sponsor	Resolve any errors in claim forms and submit claim to the CDE for processing
State	Process claim and forward payment information to the appropriate department for payment

Claims Menu

Sponsors use the Claims Menu to access SFSP claim functions or view payment summaries. From the menu, click a claims item to access that claim function (see figure below).

Item	Description
Claim Entry	SFSP Claim Entry
Claim Rates	SFSP Claim Rates - view current claim rates
Payment Summary	Payment Summary

Figure 25: Claims Menu

Claim Dates

Various dates display throughout the claims function of CNIPS. The table below lists and describes the dates used:

Date	Description
Date Created	This date is set to the current system date when the claim is created.
Date Modified	This date is set to the current system date each time the claim is saved.
Date Received	This date is typically set to the date the claim was first submitted to CDE. The value of this field is used to validate the 60 day claim rules.
	Note: CDE staff will monitor all dates after the 60th day.
Date Accepted	This date is set to the current system date every time the claim is submitted for payment and contains no errors. If errors are detected during the submit process, the date is not set. If a claim has been modified after it has been submitted, the submitted date is removed. This date is the actual date that the claim was "last" submitted and accepted for payment.
Date Processed	This is the date that the claim was added to a processing batch via the Payment Tracking module in the Accounting program. Once the claim has been added to a batch or "batched", it cannot be modified. If any changes are to be made to the claim, a revision will need to be created.

Claim Entry

The Claim Entry function is used to enter, modify, and view claims for the Summer Food Service Program. Within Claim Entry, you can submit claims at the sponsor or site level. Original and upward adjusted claims cannot be submitted if the received date is more than 60-days since the last day of claim month/year. In order to create a claim in a given month, an application must be in effect for the period.

To access claim entry

1. On the blue menu bar at the top of the page, click **Programs**.

2. Click **SFSP**.

3. On the blue menu bar, click **Claims**.

4. On the Claims menu, click **Claim Entry**.
   The [Year] SFSP Claim Summary screen displays.

5. Click the desired Claim Month.
   The [Year] SFSP Claim Month Details screen displays.

> **Note:** The current program year is the default year if no other program year has been selected. For help selecting a new school year, see Selecting a School Year.

Claim Summary - SFSP

After selecting **Claim Entry** from the Claims menu, the SFSP Claim Year Summary for the selected year displays. This screen summarizes the Earned Amounts (the current value of the claim) the claim status, by month. Once the state has received the claim, the Date Received displays in the respective column. Once the state has processed the claim, the Date Processed appears in the respective column. The number in the Adjustment Number column refers to the number of times the original claim has been modified (Modified claims must be re-processed by the state). Clicking a claim month will take you to the [Year] SFSP Claim Month Details screen.

2008 - 2009 SFSP Claim Year Summary

02998-SFSP-02
Colyar Test SFSP
No address on file for this year
Vendor #: Z41234
payment address

Claim Month	Adj Number	Claim Status	Date Received	Date Processed	Earned Amount
Oct 2008					$0.00
Nov 2008	0	Pending			$116,013.89
Dec 2008					$0.00
Jan 2009					$0.00
Feb 2009					$0.00
Mar 2009					$0.00
Apr 2009					$0.00
May 2009					$0.00
Jun 2009					$0.00
Jul 2009					$0.00
Aug 2009					$0.00
Sep 2009					$0.00
				Year to Date Totals	**$116,013.89**

< Back

Figure 26: SFSP Claim Summary screen

Claim Month Details – SFSP

From the Claim Month Details screen, you can access a view-only summary of a claim (click **Summary**) or the complete claim by site or sponsor (click **Claim**). (Settings within the Sponsor Profile determine who is responsible for submitting claims.)

2008 - 2009 SFSP Claim Month Details

02998-SFSP-02
Colyar Test SFSP
No address on file for this year
Vendor #: Z41234
payment address

Claim Month: November 2008

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
Claim	Summary	0				$116,013.89	Pending
				Total Earned	$116,013.89	

[< Back] [Upload Data]

Figure 27: SFSP Claim Month Details Screen

Sponsor Claim Form - SFSP

The Sponsor Claim Form screen provides a place to enter sponsor-level claim reporting data for the selected month. The figures below show a partial claim form which consists of sections for meal types. Only the program portions on the claim form the sponsor is approved for will appear. The following figure is an example of a sponsor claim form. Not all fields display may apply to your sponsor organization. (The CDE determines whether the sponsor organization will submit sponsor-level or site-level claims.)

VIEW | **MODIFY** | DELETE | INTERNAL USE ONLY

2007 - 2008 SFSP Sponsor Claim For Reimbursement

02998-SFSP-02
Colyar Test SFSP
No address on file for this year
Vendor #: Z41234
payment address

General Information

		From	To
1.	Period covered by this claim:	05/01/2008	05/31/2008
2.	Total number of participating sites for claim period:		1

		Number of Participating Sites	Total Number of Days Food Served
3.	Breakfast	0	0
4.	AM Snack	0	0
5.	Lunch	1	20
6.	PM Snack	0	0
7.	Supper	0	0
8.	CCNSP Snack	0	0

Figure 28: SFSP Sponsor Claim Report I (Partial)

Self-Prep and/or Vended-Rural Meals Served to Children

(Report only meals meeting the requirement on the agreement)

		First Meals Served	Second Meals Served	Camp Meals Served	Total Meals Served
9.	Breakfast	0	0	0	0
10.	AM Snack	0	0	0	0
11.	Lunch	200	3	0	203
12.	PM Snack	0	0	0	0
13.	Supper	0	0	0	0
14.	CCNSP Snack	0	0	0	0

Vended-Urban Meals Served to Children

(Report only meals meeting the requirement on the agreement)

		First Meals Served	Second Meals Served	Camp Meals Served	Total Meals Served
15.	Breakfast	0	0	0	0
16.	AM Snack	0	0	0	0
17.	Lunch	0	0	0	0
18.	PM Snack	0	0	0	0
19.	Supper	0	0	0	0
20.	CCNSP Snack	0	0	0	0

Internal Use Only

Received Date: 06/01/2008

Submission Type: Original

Reason Code: Original

'One Time Only' Approval Date:

Comments:

Comment(s) to Sponsor:

Created By: Developer on: 07/09/2009   Modified By: Developer on: 07/16/2009

Save Cancel

VIEW | **MODIFY** | DELETE | INTERNAL USE ONLY

Figure 29: SFSP Sponsor Claim Report II (Partial)

Site Claim Form - SFSP

The Site Claim Form screen provides a place to enter site-level claim reporting data for the selected month, depending on if the site is a Camp or Non-Camp. The figures below show a partial claim form for a non-camp site which consists of sections for meal types. Only the program portions on the claim form the sponsor is approved for will appear. The following figure is an example of a site claim form. Not all fields display may apply to your sponsor organization.

Self-Prep and/or Vended-Rural Meals Served to Children

(Report only meals meeting the requirement on the agreement)

		First Meals Served	Second Meals Served	Camp Meals Served	Total Meals Served
9.	Breakfast	0	0	0	0
10.	AM Snack	0	0	0	0
11.	Lunch	200	3	0	203
12.	PM Snack	0	0	0	0
13.	Supper	0	0	0	0
14.	CCNSP Snack	0	0	0	0

Vended-Urban Meals Served to Children

(Report only meals meeting the requirement on the agreement)

		First Meals Served	Second Meals Served	Camp Meals Served	Total Meals Served
15.	Breakfast	0	0	0	0
16.	AM Snack	0	0	0	0
17.	Lunch	0	0	0	0
18.	PM Snack	0	0	0	0
19.	Supper	0	0	0	0
20.	CCNSP Snack	0	0	0	0

Internal Use Only

Received Date:	06/01/2008
Submission Type:	Original
Reason Code:	Original
'One Time Only' Approval Date:	
Comments:	
Comment(s) to Sponsor:	

Created By: Developer on: 07/09/2009   Modified By: Developer on: 07/16/2009

Save   Cancel

VIEW | **MODIFY** | DELETE | INTERNAL USE ONLY

Figure 30: SFSP Site Claim Report

To add an original claim (sponsor)

Claims can be added for any eligible month in the program year, as long as an application is in effect for that period. Once a claim has been completed and submitted without error, the State can process the claim and batch the claim for payment.

WARNING: An original claim cannot be submitted if the received date is more than 60-days since the last day of claim month/year.

1. From the Claims menu, click **Claim Entry**.
   The [Year] SFSP Claim Summary screen displays.

2. Click the desired Claim Month.
   The [Year] SFSP Claim Month Details screen displays.

3. Click **Add Original Claim**.

   > **Note**: The **Add Original Claim** button only displays on Claim Month Details screens that currently have no claims created.

4. Enter claim information for all enrolled programs.

5. Click **Save**.
   A confirmation screen displays.

6. Click **<Edit** to return to the previous screen..
   -OR-
   Click **Finish**

To add an original claim (site)

Claims can be added for any eligible month in the program year, as long as an application is in effect for that period. Once a claim has been completed and submitted without error, the State can process the claim and batch the claim for payment.

> **WARNING**: An original claim cannot be submitted if the received date is more than 60-days since the last day of claim month/year.

1. From the Claims menu, click **Claim Entry**.
   The [Year] SFSP Claim Summary screen displays.

2. Click the desired Claim Month.
   The [Year] SFSP Claim Month Details screen displays.

3. Click **Add Original Claim**.
   The [Year] SFSP Claim Site List screen displays.

   > **Note**: The **Add Original Claim** button only displays on Claim Month Details screens that currently have no claims created.

2007 - 2008 SFSP Claim Site List

02998-SFSP-02
Colyar Test SFSP
No address on file for this year
Vendor #: Z41234
payment address

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code
Apr 2008	0				

Sponsor Claim Information | Internal Use Only

Actions	Site #	Site Name	Errors	Status
	14064	Colyar Test SFSP 1		Not Eligible
Add	14065	Colyar Test SFSP 2		
	14066	Colyar Test SFSP 3		Not Eligible
Add	14067	Colyar Test SFSP 4		
	14068	Colyar Test SFSP 5		Not Eligible

< Back

Figure 31: SFSP Claim Site List

4. Under Actions, click **Add** to the left of the Site Name you wish to add an original claim for.
   The [Year] SFSP Site Claim Report screen displays.

5. Enter claim information..

6. Click **Save**.
   A confirmation screen displays.

7. Click **<Edit** to return to the previous page.
   -OR-
   Click **Finish**.

To submit claim for payment

WARNING: An original claim or upward adjusted claim cannot be submitted if the received date is more than 60-days since the last day of claim month/year.

1. From the Claims menu, click **Claim Entry**.
   The [Year] SFSP Claim Summary screen displays.

2. Click the desired Claim Month.
   The [Year] SFSP Claim Month Details screen displays.

3. Click the checkbox in the Certification section.

4. Click **Submit For Payment**.
   A confirmation message displays.

   Note: The **Submit For Payment** button is enabled only on Claim Month Details screens that currently have pending claims displayed.

To revise a sponsor claim

Downward adjusted claims may be revised at any time. Upward adjusted claims may be revised if the date of submission is within 60 days of the last day of the claim month. Revised claims must be re-processed by the state regardless of their original status.

1. From the Claims menu, click **Claim Entry**.
    The [Year] SFSP Claim Summary screen displays.

2. Click the desired Claim Month.
    The [Year] SFSP Claim Month Details screen displays.

3. Click **Add Revision**.
    The [Year] SFSP Claim Site List screen displays.

4. Make any necessary changes to the claim.

5. Click **Save**.
    A confirmation screen displays.

6. Click **<Edit** to return to the SFSP Site Claim Report screen you just modified.
    -OR-
    Click **Finish** to return to the SFSP Claim Site List screen.

To revise a site claim

Downward adjusted claims may be revised at any time. Upward adjusted claims may be revised if the date of submission is within 60 days of the last day of the claim month. Revised claims must be re-processed by the state regardless of their original status.

1. From the Claims menu, click **Claim Entry**.
    The [Year] SFSP Claim Summary screen displays.

2. Click the desired Claim Month.
    The [Year] SFSP Claim Month Details screen displays.

3. Click **Add Revision**.
    The [Year] SFSP Claim Site List screen displays.

4. Click **Revise** for the Site you wish to revise.

5. Make any necessary changes to the claim.

6. Click **Save**.
    A confirmation screen displays.

7. Click **<Edit** to return to the SFSP Site Claim Report screen you just modified.
    -OR-
    Click **Finish** to return to the SFSP Claim Site List screen.

To view a claim

1. From the Claims menu, click **Claim Entry**.
    The [Year] SFSP Claim Summary screen displays.

2. Click the desired Claim Month.
    The [Year] SFSP Claim Month Details screen displays.

3. Under Claim Items, click Claim to the left of the claim you wish to view.
    The SFSP Claim Site List screen displays.

4. Under Actions, click View to the left of the claim site you wish to view.
    The SFSP Site Claim Report screen displays.

To view a claim summary

The Claim Summary allows you to view a summary of the month's claim in an easy-to-read or print format. No modifications can be made from this page.

1. From the Claims menu, click **Claim Entry**.
   The [Year] SFSP Claim Summary screen displays.

2. Click the desired Claim Month.
   The [Year] SFSP Claim Month Details screen displays.

3. Under Claim Items, click **Summary** to the left of the claim summary you wish to view.
   The SFSP Claim For Reimbursement Summary screen displays.

To delete a sponsor claim

1. From the Claims menu, click **Claim Entry.**
   The [Year] SFSP Claim Year Summary screen displays.

2. Click the desired Claim Month.
   The [Year] SFSP Claim Month Details screen displays.

3. Under Claim Items, click **Claim** to the left of the claim you wish to delete.

4. Click **Delete** in the Edit menu in the upper-right corner.

> **WARNING**: Once the claim has been deleted, it is permanently removed from the application and cannot be restored. Use caution before deleting a claim.

5. Click **Delete.**
   A confirmation screen displays.

6. Click **Finish**.

To delete a site claim

1. From the Claims menu, click **Claim Entry.**
   The [Year] SFSP Claim Year Summary screen displays.

2. Click the desired Claim Month.
   The [Year] SFSP Claim Month Details screen displays.

3. Under Claim Items, click **Claim** to the left of the claim you wish to delete.

4. Under Actions, click **Delete** for the corresponding site name.

5. Click **Delete** in the Edit menu in the upper-right corner.

> **WARNING**: Once the claim has been deleted, it is permanently removed from the application and cannot be restored. Use caution before deleting a claim.

6. Click **Delete.**
   A confirmation screen displays.

7. Click **Finish**.

To upload data

TIP: Only text (.txt) files can be uploaded.

1. From the Claims menu, click **Claim Entry**.
   The [Year] SFSP Claim Summary screen displays.

2. Click the desired Claim Month.
   The [Year] SFSP Claim Month Details screen displays.

3. Click **Upload Data**.
   The SFSP Claim Upload screen is displayed.

4. Click **Browse**.
   The Choose file dialog box opens.

5. Navigate to the location of the file you wish to upload in the dialog box.
   Click the file to select it.

6. Click **Open**.
   The path of the file is displayed in the Select File text box.

7. Click **Upload**.
   Once file has been uploaded without errors, a confirmation displays.

8. Click **Finish** to return to the [Year] SFSP Claim Month Details screen.

Payment Summary

The Payment Summary screen provides a list of schedules and process dates for the selected school year. Each schedule number and process date represents payments that have been scheduled. The payment summary may include a portion of a claim, i.e., state or federal payment.

Payments from payment batches are grouped by program and sorted by date. The sponsor's payment summary displays the following items:

Item	Description
Batch Number	Number associated with a payment batch from the State
Processed Date	Date the claim was processed by the State
Beginning Balance	Balance of sponsor's account after last payment batch
Earned Amount	Original amount of the claim at the time of submission
Adjustments	Any changes (+/-) to the claim from the state or sponsor
Distribution Amount	Final amount to be paid to the sponsor institution

To access Payment Summary

1. On the blue menu bar, click **Claims**.

2. On the Claims menu, click **Payment Summary**.
   The Sponsor Payment Summary screen displays.

To view a payment summary

1. Access the **Payment Summary** through the Claims menu.
    The Sponsor Payment Summary screen displays.

2. Click the text of the schedule number you wish to view.
    The payment summary displays for all payments in the month of the batch.

3. Click **<Back** to return to the Sponsor Payment summary screen.

Payment Summary List

00002
ALACHUA COUNTY SCHOOL BOARD
No address on file for this year
Vendor #: 0322-10
payment address

Schedule Number	Processed Date	Warrant Issue Date	Earned Amount	Adjustments	Distribution Amount
0560003	02/25/2008		$ 0.00	$ 0.00	$ 0.00
0560002	02/25/2008		$ 1,920.00	$ 0.00	$ 1,920.00
0560001	02/25/2008		$ 114,540,209.02	$ 6,412.12	$ 114,540,209.02

< Back

Figure 32: Sponsor Payment Summary List screen

5

Security

Security is an important part of the integrity of the CNIPS site. The Security component of the SFSP module is the access point to user-level security settings. Individuals may change their password through the Change Password feature, while sponsor users and administrators with security clearance can manage other user-level security settings through the User Manager.

Note: The Security component of the SFSP module is primarily intended for sponsor users and administrators. State users may prefer to access the Security module through the CNIPS programs menu.
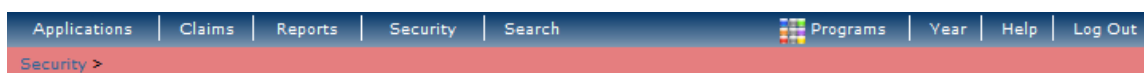
Security menu

The Security menu is the access point to the Change Password and User Manager functions.

Note: Security settings at the group-level are managed through the Security module. State users wishing to access additional security functions should click Programs on the menu bar and select Security.

To access the Security menu

1. Click **Security** on the blue menu bar at the top of the page.
   The Security menu displays.

2. Click a security item to access that security function.

| Applications | Claims | Reports | Security | Search | | Programs | Year | Help | Log Out |

Security >

Item	Description
Change Password	Change Password for Logged-In User
User Manager	User Manager

Figure 33: Security Menu screen

Change Password

System security is greatly enhanced by regularly modifying your password.

Note: Default security settings require that a password must be between six and twelve characters and contain at least one number and one symbol,

TIP: Strong, secure passwords contain between 6 and 15 characters, including numbers, upper-case, and lower-case letters.

To access Change Password

1. On the blue menu bar, click **Security**.

2. On the Security menu, click **Change Password.**
   The Change Password screen displays.

3. Enter your **New Password**.

4. Re-Enter your New Password.

5. Click **Save**.
   A confirmation message displays.

6. Click **<Edit** to return to the Change Password screen you just modified.
   -OR-
   Click **Finish** to return to the Security menu.

Change Password

Please enter your new password, then re-enter your new password to verify it. Select Save to continue.

New Password: [   ]

Re-Enter New Password: [   ]

Save   Cancel

Figure 34: Change Password screen

User Manager

The User Manager allows authorized users to set up and maintain various components of a user's security access. The features within the User Manager enable you to add new users, set up and modify user profiles, change passwords, and set assigned groups, security rights and associated sponsors.

To access User Manager

1. On the blue menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

To search for a user

Before proceeding in the User Manager, you must always search for and select a user you wish to access. If you have already selected a user or are elsewhere in the application, return to the User Manager screen.

1. From the User Manager/Search for User Page, select the type of search on the **Search By** drop-down list. Enter the Last Name, User Name or CNIPS ID in the text box, and click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

Note: The names displayed are dependent on the user's type. The chart below describes how a user's type is denoted and which users will be displayed in the search for each type:

User Type	Denoted by	Users displayed
Administrators	"Yes" in Administrator column	All
State Employees	Names and User IDs in bold	Non-administrators
Sponsor users	Non-bolded names; blank administrator column	Non-administrators

2. Select the User you wish to access.
   The User Options menu displays.

To add a new user

If you have already selected a user or are elsewhere in the application, return to the User Manager screen.

1. From the User Manager screen, click **Add New User**.
   The User Profile screen displays.

2. Enter the new user's information in the User Information section.

3. Enter the new user's login name and password.
   Enter the password again for confirmation.
   [The new user is required to create a new password upon first logging in.]

   Note: Default settings require a password to be at between six and twelve characters in length, containing one or more numbers and one or more symbols. However, these settings can be changed by state administrators within the Configuration module.

   TIP: You can add this URL to your browser's FAVORITES list or create a shortcut to the web site on your desktop for quicker access to the site. Refer to your browser or operating system help files for further information.

4. Use the buttons to select if the user is a state employee, an administrator, and if the user is to only be granted access to associated sponsors.

5. Use the drop-down menu to select the user's status.

6. Click **Save**.
   A confirmation screen displays.

7. Click **<Edit** to return to the User Profile screen you just modified.
   -OR-
   Click **Finish** to return to the User Options menu.

> **Note**: After creating a new user, it is recommended that you assign the user to an assigned group. Until the user is linked to a security group, he or she does not have any security rights and will not be able to access any system functions. For additional help on this topic, see User's Assigned Groups.

User's Profile

The User's Profile enables you to view and modify a user's basic information, login, security base, and status. In addition to name, contact, and login information, the user's profile specifies whether the user is a state employee, an administrator, and if the user is granted access to associated sponsors only. These specifications affect which program functions the user may access. Furthermore, users specified as **Active** have access to all normal functions, while **Inactive** and **Locked** users are not permitted to login or access the system.

> **Note**: Passwords cannot be changed within the user's profile. This function is accessed through the User Manager. For information regarding resetting passwords, see Reset User's Password.

To access User's Profile

1. On the blue menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

3. On the **Search By** drop-down list, select the type of search, enter the Last Name, User Name or CNIPS ID in the text box, and then click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access.
   The User Options menu displays.

5. Click **User's Profile**.
   The User's Profile screen displays.

User Profile

User Information

First Name:	
Middle Initial:	
Last Name:	
Email Address:	
Phone Number (555-555-5555):	

Login Information

User Name:	
Password:	
Confirm Password:	
Require password change next login:	☑

Security Base

User is an Administrator:	○ Yes ◉ No
Security Group(s):	No Defaults available
Associated to Sponsor(s):	☑ Colyar Test SFSP

Status

User Status:	Active ▾

Save   Cancel

Figure 35: User Profile screen

To view or modify a user's profile

1. Access the User's Profile you wish to view or modify through the User Manager.

2. Modify any desired information.

3. Click **Save**.
   A confirmation screen displays.

4. Click **<Edit** to return to the User Profile screen you just modified.
   -OR-
   Click **Finish** to return to the User Options menu.

   > **Note:** To make any modifications, **MODIFY** must be selected on the Edit menu in the top-right corner (see figure below).

To delete a User's Profile

> **WARNING:** Once a profile has been deleted, it cannot be restored. Use caution before deleting profiles.

1. On the blue menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access.
   The User Options menu displays.

5. Click **User's Profile**.
   The User Profile screen displays.

6. On the Edit menu, click **DELETE**.
   A warning displays.

7. Click **Delete**.
   A confirmation screen displays.

8. Click **Finish** to return to the User Options menu.

User's Assigned Group(s)

The User Assigned Group(s) enables you to assign a user to numerous pre-defined groups. Groups are created as a way to categorize multiple users together to provide identical security settings for the entire group. Changing any security setting for the group changes the setting for each member in that group.

To access User Assigned Group(s)

1. On the blue menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access.
   The User Options menu displays.

5. Click **User's Assigned Group(s)**.
   The User's Assigned Group(s) screen displays.

VIEW | MODIFY

User's Assigned Group(s)

User Name: spapp2   **Name:** Test Sponsor2

Available Group	Assigned Group
SNP Sponsor - APPS SNP Sponsor - CLAIMS FDP Agency Sponsor type A,B, E SFSP ALL SNP Sponsor Admin CACFP Reviews FDP	SFSP Sponsor

< Back

Figure 36: User's Assigned Group(s) screen

To add a user to assigned group(s)

1. On the blue menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access.
   The User Options menu displays.

5. Click **User's Assigned Group(s)**.
   The User's Assigned Group(s) screen displays.

6. Select the group you want to add the user to on the **Available Group** list.

> **Note:** To make any modifications, **MODIFY** must be selected on the Edit menu.

TIP: You can easily select multiple groups two ways:

Available Group

| State Program |
| State Claims ONLY |
| State Accounting |
| Accounting |
| Web Arts |
| Guest |
| Test |
| SNP Sponsor - APPS |

Hold down the Shift key while clicking State Program and Test to select all contiguous groups.

Available Group

| State Claims ONLY |
| State Accounting |
| Accounting |
| Web Arts |
| Guest |
| Test |
| SNP Sponsor - APPS |
| SNP Sponsor - CLAIMS |

Hold down the Ctrl key while clicking each group to select all groups at one time.

7. Click **Add>**.

8. Click **OK** on the Message box that appears.

9. Click **Save**.
   A confirmation screen displays.

10. Click **<Edit** to return to the User Assigned Group(s) screen you just modified.
    —OR—
    Click **Finish** to return to the User Options menu.

To remove a user from assign group(s)

1. On the blue menu bar, click **Security**.

2.   Click **User Manager**.
     The Search for User screen displays.

3.   On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of
     the Name in the text box, and then click **Search**.
     —OR—
     Click **All** to display a list of all users.
     A list of users matching the search criteria displays.

4.   Select the User you wish to access.
     The User Options menu displays.

5.   Click **User's Assigned Group(s)**.
     The User's Assigned Group(s) screen displays.

6.   Select the group you want to remove the user from on the **Available Group** list.

TIP: You can easily select multiple groups two ways:

Available Group

| State Program |
| State Claims ONLY |
| State Accounting |
| Accounting |
| Web Arts |
| Guest |
| Test |
| SNP Sponsor - APPS |

Hold down the Shift key while clicking State Program and Test to select all contiguous groups.

Available Group

| State Claims ONLY |
| State Accounting |
| Accounting |
| Web Arts |
| Guest |
| Test |
| SNP Sponsor - APPS |
| SNP Sponsor - CLAIMS |

Hold down the Ctrl key while clicking each group to select all groups at one time.

Note: To make any modifications, **MODIFY** must be selected on the Edit menu.

7.   Click **<Remove**.

8.   Click **OK** on the Message box that appears.

9.   Click **Save**.
     A confirmation screen displays.

10. Click **<Edit** to return to the User's Assigned Group(s) screen you just modified.
     —OR—
     Click **Finish** to return to the User Options menu.

User's Security Rights

The User Security Rights feature enables administrators to set security rights for an individual
user. These rights determine the areas within the system's programs and modules the user is
granted access.

When a user has assigned groups, the groups' default security settings will apply and display in the user's security rights. No more rights may be given to the user than are given to the group. However, administrators may deny user's specific rights through this feature. Users cannot modify their own security rights.

To access User Security Rights

1. On the blue menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access.
   The User Options menu displays.

5. Click **User's Security Rights**.
   The User's Security Rights screen displays.

VIEW | **MODIFY**

User Security Rights

User Name: spapp2   **Name:** Test Sponsor2

Security Rights Settings

SFSP   bottom

Allow	Deny	
⦿	○	SFSP
⦿	○	Applications
⦿	○	SFSP Sponsor's Profile Information
⦿	○	Sponsor Manager
⦿	○	Sponsor Profile
⦿	○	Sponsor Profile - View
⦿	○	Sponsor Profile - Modify
⦿	○	Site Manager
⦿	○	Site Profile
⦿	○	Site Profile - View
⦿	○	Site Profile - Modify
⦿	○	Add Site
⦿	○	Application Packet
⦿	○	Application Packet
⦿	○	Submit Application Packet for Approval

Figure 37: User's Security Rights screen (partial)

To modify a user's security rights

1. On the blue menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access.
   The User Options menu displays.

5. Click **User's Security Rights**.
   The User's Security Rights screen displays.

   > **Note:** To make any modifications, **MODIFY** must be selected on the Edit menu.

6. Modify the desired information.

7. Click **Save**.
   A confirmation screen displays.

8. Click **<Edit** to return to the User Security Rights screen you just modified.
   —OR—
   Click **Finish** to return to the User Options menu.

   > **Note**: The security rights available to a user depend on the user's assigned groups. Only the security rights assigned to the user's assigned groups display in the user's security rights. If you wish to assign additional security rights to a user that are not displayed as options in the user's security rights, you will need to assign the user to the assigned group with the desired rights.

User's Associated Sponsors

The User's Associated Sponsors feature enables you to associate individual users to specific sponsors. In order for users to have access to system functions for a sponsor, such as claims access, users must be associated with the sponsor. Similarly, users who should no longer have access to sponsor functions need to have their sponsor association removed.

To access User's Associated Sponsors

1. On the blue menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access.
   The User Options menu displays.

5. Click **User's Associated Sponsors**.
   The User's Associated Sponsors screen displays.

User's Associated Sponsors

User Name: spapp2   **Name:** Test Sponsor2

Associated Sponsors

Actions	CNIPS ID	Sponsor Name
Remove	03013	Biggs Unified
Remove	03016	Carol's Test SFSP Sponsor
Remove	02998	Colyar Test SFSP
Remove	03008	Gridley Unified
Remove	03010	OAKENDELL
Remove	03015	Pleasanton Unified

Note: Make sure the user has rights to 'select sponsors' otherwise they will only be shown the first Sponsor

< Back   Add Sponsors

Figure 38: User's Associated Sponsors screen

Reset User's Password

The Reset User's Password enables you to reset a user's password required to login to the system.

> **Note:** Passwords can be reset for user's who have forgotten their passwords. If a user attempts to log in with an incorrect password, a Login Error will display. The user will be temporarily locked out of the system after six unsuccessful login attempts Remember, passwords are case-sensitive.

To access Reset User's Password

1. On the blue menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access.
   The User Options menu displays.

5. Click **Reset User's Password**.
   The Reset User's Password screen displays.

Reset User's Password

User Information

First Name:	Test
Middle Initial:	
Last Name:	Sponsor2
User Name:	spapp2

Login Information

New Password:	
Confirm New Password:	
Require password change next login:	☑

Save   Cancel

Figure 39: Reset User's Password screen

To reset a User's Password

1. On the menu bar, click **Security**.

2. Click **User Manager**.
   The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then click **Search**.
   —OR—
   Click **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access.
   The User Options menu displays.

5. Click **Reset User's Password**.
   The Reset User's Password screen displays.

6. Enter the New Password.

   > **Note:** Default settings require a password to be at least six characters in length, containing one or more numbers. However, these settings can be changed by state administrators within the Configuration module.

   > **TIP:** Strong, secure passwords contain between 6 and 15 characters, including numbers, upper-case, and lower-case letters.

7. Confirm the New Password.

8. Click **Save**.
   A confirmation screen displays.

9. Click **<Edit** to return to the Reset User's Password screen.
   —OR—
   Click **Finish** to return to the User Options menu.

6

Search

The Search menu item allows users to quickly select a site to work with within the CNIPS application.

Search Menu

Clicking the Search menu option directs the user to a menu in order to search for a specific site.

To select a site

1. On the blue menu bar, click **Search**.

2. Click **Site Search**.
    The Site Search screen displays.

3. Enter all or a portion of the Site Number, Site Name, CDS Code, Site Type, Street Address, City, State, and/or Zip Code in the respective text box(es) and click **Search**.

    Note: At least one selection must be made.

4. Click the sponsor you wish to work with.

SFSP Site Search

02998-SFSP-02
Colyar Test SFSP
1 Main St
Big City, CA 95159
ALPINE
CD:
Vendor #: Z41234

Search for Sites

Site Number:

Site Name:

CDS Code:

Site Type: Open

Street Address:

City:

State: Zip Code:

Search

Sites Found: 3

Site #	Site Name	Status	Street Address	Sponsor Name
14064	Colyar Test SFSP 1	Active	1 Main Street ANy City CA 91234	Colyar Test SFSP

Figure 40: Site Search screen

Index